

## **SOP Document for Level9Virtual — “Client Onboarding & VA Assignment SOP”**

**Title:** Level9Virtual — Client Onboarding & VA Assignment Standard Operating Procedure

**Purpose:** To ensure that every new client of Level9Virtual is onboarded smoothly, assigned the appropriate Virtual Assistant (VA) or VA-POD, and that expectations, workflows, and communication are clearly established to guarantee quality, accountability, and a great working relationship.

**Scope:** Applies to all new clients who engage Level9Virtual services (Dedicated VA, VA POD, Live Answering, Website Build, etc.). All onboarding and VA assignment staff must follow this process.

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### **Procedure**

#### **1. Client Intake & Needs Assessment**

1.1 Send the “Role Description Form (RDF)” to the prospective client to gather details:

- Business name, website, industry
- Scope of work (tasks needing support), preferred service type (Dedicated VA, POD, Live Answering, Project-based) [Level9 Virtual+2Level9 Virtual+2](#)
- Expected hours (full time, part time, or monthly hours) or project needs
- Special requirements: skills needed (e.g. CRM, marketing automation, web dev, graphic design, social media, etc.) [Level9 Virtual+1](#)
- Preferred timezone, communication preferences, and reporting expectations

1.2 Review client's requirements internally to determine suitability and resource availability.

1.3 Confirm service pricing and flat-rate plan (if Dedicated VA or POD) or project fee (for website builds or one-time projects) based on the service selected by client. [Level9 Virtual+2Level9 Virtual+2](#)

1.4 Present the contract/agreement (flat-rate subscription or project-based) to client with terms: no hidden fees, payroll & compliance handled by Level9Virtual, month-to-month subscription (after minimum 90 days if applicable) [Level9 Virtual+1](#)

1.5 Upon agreement, proceed to onboarding.

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## **2. VA Matching & Assignment**

2.1 Use Level9Virtual's proprietary **Personality and Skills Profile Match (PSPM)** system to pick a VA (or VA team) whose skills and personality fit the client's needs. [Level9 Virtual+1](#)

2.2 For full-service or POD clients, assemble a VA team (if multiple skill sets needed: e.g. admin + design + marketing + dev). Assign a Project Manager (PM) if required. [Level9 Virtual+2](#)  
[Level9 Virtual+2](#)

2.3 Provide the client with the assigned VA's profile / short bio (skills, role, communication channel, timezone). Offer a brief "Intro & Alignment" call (if needed) to align expectations.

2.4 Set up tracking & management tools:

- Use time-tracking app (e.g. Time Doctor 2) to monitor hours, breaks, and screenshots for productivity verification. [Level9 Virtual+1](#)
- Use project management / communication tools (e.g. Asana, Slack, or equivalent) to assign tasks, manage communication, and store deliverables.

2.5 Ensure access credentials: provide access for VA to necessary systems (CRM, websites, ad accounts, design tools, etc.) as per the client's requirements.

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## **3. Onboarding & Initial Setup**

3.1 Provide the VA with an onboarding brief:

- Client context: business overview, services/products, brand guidelines (if any), tone & style preference
- Task list: first batch of tasks — admin, outreach, content, or project-based
- Communication protocol: how and when to report, daily/weekly updates, lines of escalation

3.2 Client/VA Kickoff Meeting (optional but recommended):

- Introduce VA to client (video call or chat)
- Clarify deliverables, timelines, feedback schedule
- Agree on milestones, deadlines, and expected work hours

3.3 First 48–72 hours: Monitor VA's performance closely, ensure connectivity, access, and confirm that VA understands tasks and client expectations.

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## **4. Ongoing Management, Reporting, and Quality Assurance**

4.1 Daily or weekly reporting by VA:

- Tasks completed
- Tasks pending
- Issues or blockers

4.2 Client feedback session (weekly or biweekly for first month) to gauge satisfaction and to correct course if needed.

4.3 Internal support from Level9Virtual SME / support team available for VAs if they encounter problems — e.g. tool/setup issues, training, or skill gaps. [Level9 Virtual+1](#)

4.4 Payroll & HR compliance are handled by Level9Virtual — clients don't need to manage salary transfers, benefits, or compliance. [Level9 Virtual+1](#)

4.5 Performance reviews every month (or after defined period) to ensure VA maintains productivity and quality. If VA fails, re-match or replace as per agreement.

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## **5. Project Completion / Transition / Scaling**

5.1 For project-based work (e.g. website build, one-time campaign, ad setup) — after deliverables are complete, conduct final review with client, gather feedback, obtain approval/payment, and archive project documentation.

5.2 For ongoing subscriptions (Dedicated VA / POD): continue regular reporting, performance reviews, scaling up/down hours as needed, and manage workload accordingly.

5.3 If client wants to add or change services (e.g. add ads management, social media, design) — repeat matching process to assign additional VAs or POD resources.

5.4 Maintain a record of deliverables, communications, and client history in internal CRM for future reference.

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### **Revision History:**

- Version 1.0 — initial SOP — (Date)
- Version 1.1 — added VA POD assignment and project-based flow — (Date)